Section 4 - TOPICAL MODULES								
Part A - ASSETS AND LIABILITIES								
STA	STATEMENT C Read to respondent: These next questions concern various assets and liabilities.							
1a.	As of (Read last day of reference period), did anyone outside of this household owe money to as the result of the sale of a business or property? (Exclude mortgages owed to which have already been reported.) 8200 1 Yes 2 No x1 DK x2 Ref.							
b.	How much was owed to?	1						
	(If shared, count only 's share.)	\$. 00 x1 □ DK x2 □ Ref.						
		8203	1 Office I	Jse Only				
2a.	ASK OR VERIFY – Did own any U.S. Savings Bonds (Series E, or EE) as of (Read last day of reference period)?		1 ☐ Yes 2 ☐ No - S	KIP to Check Item T1				
b.	What was the FACE VALUE of the U.S. Savings Bonds that owned? (If ownership was shared, count only 's share.)	8206	\$ DK 2 Ref.	. 00				
CHE		_	2 Intervie	ouse in household – <i>SKIP to 4a</i> ew for spouse not yet conducted ew for spouse already conducted – o 4a				
2c.	As of (Read last day of reference period), did own jointly with 's (husband/wife) any checking accounts which do NOT earn interest?	×	Yes No DK	SKIP to 3a				
d.	What is your best estimate of the amount of money and 's (husband/wife) had in those checking accounts as of (Read last day of reference period)?	i >	\$ 3 None 1 DK 2 Ref.	. 00				
3a.	As of (Read last day of reference period), did and 's (husband/wife) together owe any money for –	1 1 1 1		If "Yes" to 3a ask – 3b. How much was owed as of (Read last day of reference period)?				
	(1) Store bills or credit card bills?	×	1 □ Yes 2 □ No 1 □ DK 2 □ Ref.	8214				
	(2) Loans obtained through a bank or credit union, other than car loans or home equity	0216	ı □ Yes	8218				
	(3) Any other debt we have not yet mentioned (include medical bills not covered by insurance, money owed to private individuals, and any other debt not covered;	×	2 □ No 1 □ DK 2 □ Ref.	x1 □ DK − <i>Probe</i> x2 □ Ref.				
	exclude mortgages, home equity loans, and car loans)?	×	1 Yes 2 No 1 DK 2 Ref.	\$. 00 x1 DK - Probe x2 Ref.				
NOT	ES							

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Section 4 - TOPICAL MODULES (Continued)								
	Part A - ASSETS AND	LIABILITIES (Continued)						
4a.	(Besides any checking accounts owned jointly with 's spouse,) as of (Read last day of reference period), did own any (other) checking accounts which did NOT earn interest?	8232 1						
b.	What is your best estimate of the amount of money had in those checking accounts as of (Read last day of reference period)? (If account was shared, count only 's share.)	\$. 00 x3 None						
c.	Did have any debts, such as credit card bills, loans from a financial institution, or educational loans, in 's OWN name?	8234 1 Yes 2 No X1 DK SKIP to Check Item T2 X2 Ref.						
d.	As of (Read last day of reference period), did owe any money (in's OWN name) for -	If "Yes" to 4d ask – 4e. How much was owed as of (Read last day of reference period)?						
	(1) Store bills or credit card bills?	8236 1						
	(2) Loans obtained through a bank or credit union, other than car loans or home equity loans? (3) Any other debt we have not yet mentioned (include medical bills not covered by insurance, money owed to private individuals, and any other debt not covered;	8240 1 Yes 8242 \$. 00						
	exclude mortgages, home equity loans, and car loans)?	8244 1 ☐ Yes 2 ☐ No x1 ☐ DK — Probe x2 ☐ Ref.						
CHE		1 ☐ Yes 2 ☐ No – <i>SKIP to 7a, page 60</i>						
5a.	Does have any Individual Retirement Accounts – any IRAs – in 's OWN name?	1 Yes 2 No)						
	(Do not mark "Yes" if is only included in spouse's IRA account.)	's x1 □ DK x2 □ Ref. SKIP to 6a						
b.	For how many years has contributed to 's IRA accounts?	8262 Years Years X1 □ DK X2 □ Ref SKIP to 6a						
c.	As of (Read last day of reference period), what is the total balance or market value (including interest earned) of 's IRA accounts?	x1 □ DK x2 □ Ref. – SKIP to 6a \$. 00 − SKIP to 5e x1 □ DK x2 □ Ref. – SKIP to 6a						
d.	If I were to call back later would you be able to provide me with an estimate of the amount? (This information is especially important for the purposes of this survey.)	1 Yes - Mark Callback Summary and Reminder Card, Item 17 2 No x1 DK x2 Ref. SKIP to 6a						
e.	(Please look at Card AA.) As of (Read last day of reference period), which kinds of assets did hold in 's IRA accounts? Mark (X) all that apply.	8268 1 Certificates of deposit or other saving certificates 2 Money market funds 8272 3 U.S. Government securities						
	Anything else?	8274 4						
		8282 x1 DK						

725	Section 4 - TOPICAL MODULES (Continued)							
	Part A - ASSETS AND I	LIABIL	TIES (Continued)					
6a.	Does have a KEOGH account in 's OWN name?	8284	1 □ Yes 2 □ No x1 □ DK x2 □ Ref.					
b.	For how many years has contributed to 's KEOGH account?	8286	Years x1 □ DK x2 □ Ref. – <i>SKIP to 7a</i>					
c.	As of (Read last day of reference period), what was the total balance or market value of assets in 's KEOGH account(s)?	8288	\$. 00 - SKIP to 6e x1 DK x2 Ref SKIP to 7a					
d.	If I were to call back later would you be able to provide me with an estimate of the amount? (This information is especially important for the purposes of this survey.)	8290	1 ☐ Yes – Mark Callback Summary and Reminder Card, Item 18 2 ☐ No – SKIP to 7a					
e.	(Please look at Card AA.) As of (Read last day of reference period), which kinds of assets did hold in 's KEOGH account(s)? Mark (X) all that apply. Anything else?	8294 8294 8296 8298 8300 8302 8304	1 ☐ Certificates of deposit or other savings certificates 2 ☐ Money market funds 3 ☐ U.S. Government securities 4 ☐ Municipal or corporate bonds 5 ☐ U.S. Savings Bonds 6 ☐ Stocks or mutual fund shares 7 ☐ Other assets – Specify ☐					
		8306	x1□DK					
7a.	Does have any life insurance? (Include group policies provided by employers.)	8308	1 ☐ Yes 2 ☐ No x1 ☐ DK x2 ☐ Ref. SKIP to Statement D, page 61					
b.	What is the current FACE VALUE of ALL life insurance policies that has?	8309	\$. 00 x1 □ DK x2 □ Ref. 1 □ Office Use Only					
C.	What types of life insurance does have – is it "term insurance", "whole life", or does have both of these types?	8312	1 □ Term only 2 □ Whole life only 3 □ Both types x1 □ DK					
CHE	ISS?	8314	1 ☐ Yes 2 ☐ No - SKIP to Statement D, page 61					
7c.	Are any of's life insurance policies provided through's current employer(s)?	8316	¹ ☐ Yes 2 ☐ No – SKIP to Statement D, page 61					
d.	What is the FACE VALUE of the life insurance policies provided through 's employer(s)?	8318	\$. 00 x1 □ DK x2 □ Ref.					
NOT	ES							

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Section 4 - TOPICAL MODULES (Continued)							
Part B - MEDICAL EXPENSES AND WORK DISABILITY							
These next questions concern payments that may have made last month for medical bills for himself/herself or his/her family.							
During (Read last month), did pay any of the following:							
a. Doctor bills?	8400 1 Yes 2 No X1 DK						
b. Dentist bills?	8402 1 Yes 2 No X1 DK						
C. Hospital bills?	1 □ Yes 2 □ No X1 □ DK						
d. Expenses for prescription medicine?	8406 1 ☐ Yes 2 ☐ No X1 ☐ DK						
CHECK ITEM T4 Is one or more "Yes" boxes marked in item 1?	1 ☐ Yes 2 ☐ No – SKIP to Check Item T5						
 Not counting amounts already reported by another family member or amounts that will be reimbursed by insurance, how much did pay for medical expenses in the month of (Read last month)? 	\$. 00 x1 □ DK x2 □ Ref.						
CHECK Refer to cc item 24. What is's age?	8412 1 □ 15 years old − <i>SKIP to Check Item T9</i> 2 □ 16 to 67 years old 3 □ 68 years old or older − <i>SKIP to Check Item T9</i>						
CHECK ITEM T6 Refer to item 18a on page 7. What is marked in item 18a?	8413 1 ☐ Item 18a is blank 2 ☐ "Yes" in item 18a – <i>SKIP to 3a</i> 3 ☐ "No" in item 18a – <i>Skip to Check Item T9</i>						
STATEMENT E Now I want to ask about any have that affected 's ability	ealth or physical condition may to work.						
CHECK ITEM T7 Refer to cc item 47. Is "Disabled" (code 171) marked on the control card for?	8416 1 ☐ Yes 2 ☐ No – SKIP to 3b						
3a. We have recorded that's health or condition limits the kind or amount of work can do. Is that correct?	1 ☐ Yes – SKIP to Check Item T8 2 ☐ No – SKIP to Check Item T9						
b. Does have a physical, mental, or other health condition which limits the kind or amount of work can do?	3420 1 ☐ Yes – Mark "171" on ISS 2 ☐ No – SKIP to Check Item T9						
CHECK ITEM T8 Is "Worked" (code 170) marked on the ISS?	1 ☐ Yes – SKIP to Check Item T9						
4a. Does 's health or condition prevent from working at a job or business?	1 ☐ Yes 2 ☐ No – SKIP to Check Item T9						
b. Has been prevented from working for the past 12 months or longer?	1 ☐ Yes – SKIP to Check Item T9 2 ☐ No						
c. Is it likely that will be able to work at some time in the next 12 months?	8428 1 ☐ Yes 2 ☐ No x1 ☐ DK						
Go to Che	ck Item T9						
NOTES							

Section 4 – TOPICAL MODULES (Continued)								
Part C - REAL ESTATE, SHELTER COSTS, DEPENDENT CARE, AND VEHICLES								
	Is this the reference person's questionnaire?	8526 1 ☐ Yes 2 ☐ No – SKIP to Check Item P1,	page 67					
STA	STATEMENT F Read to respondent: These next questions concern housing costs and automobile ownership.							
	Refer to cc item 14. Is this housing unit a mobile home?	8528 1 Yes – SKIP to Check Item T1- 2 No	4, page 63					
	Refer to cc item 15. Tenure	3530 1 ☐ Owned or being bought 2 ☐ Rented for cash – SKIP to 5 3 ☐ Occupied without cash paym	nent – SKIP to 6					
	ASK OR VERIFY -	Person No. Name						
1a.	Which persons in this household are the owners of this home?	8532						
b.	In what month and year was this home purchased?	Month Year 8538 1 9						
c.	(Including rental properties attached to or located on's own residence), is there a mortgage, home equity loan, or other debt on this home?	1 Yes 2 No x1 DK x2 Ref.						
d.	Altogether, how many mortgages, home equity loans, or other debts are there on this home?	8542 Number						
	(Ask questions 1e–1k for first mortgage and then return to 1e again for any second mortgage or other loan.)	First mortgage	Second mortgage or other loan					
e.	How much principal is currently owed on this (first/other) mortgage (debt)? (If possible, please check any records you may have from the lender or mortgage company to obtain the most accurate estimate available.)	\$. 00 X1	8566 \$. 00 X1 □ DK X2 □ Ref. 8567 1 □ Office Use Only					
f.	In what year was this mortgage (loan) obtained?	8568 1 9 Year - If 1992,	8570 1 9 Year - If 1992,					
	(If mortgage was assumed, give the original date of the mortgage.)	x1 □ DK 1993, or 1994, ask month 8569 ■ Month x1 □ DK	x1 □ DK 1993, or 1994, ask month 8571 ■ Month x1 □ DK					
g.	What was the amount of the mortgage (loan) when it was obtained or last refinanced?	\$. 00	8574 \$. 00					
	(If mortgage was assumed, give the original amount of the mortgage.)	x1 ☐ DK x2 ☐ Ref. – SKIP to 2 8573 1 ☐ Office Use Only	x1 □ DK x2 □ Ref. – SKIP to 2 8575 1 □ Office Use Only					
h.	What is the total number of years over which payments are to be made?	8576 Years X8 Not fixed X1 DK	8578					
i.	What is the current annual interest rate on this mortgage (loan)?	8580 Percent x1 □ DK x2 □ Ref.	8582					
j.	Is the interest rate variable, that is, can the rate change over the term of the mortgage (loan)?	1 ☐ Yes 2 ☐ No x1 ☐ DK	8586 1 ☐ Yes 2 ☐ No x1 ☐ DK					

	Part C - REAL ESTATE, SI	HELTER COSTS, DEPENDENT CARE, AND VEHICLES (Continued)					
1k.	Was this mortgage obtained through an FHA or VA mortgage program?	8587 1 Yes - FHA 8589 1 Yes - FHA 2 Yes - VA 3 No X1 DK DK					
	Refer to item 1d, page 62 Is there another loan or mortgage?	2. 8592 1 Yes – Ask item 1e, page 62, for next loan or mortgage 2 No – SKIP to 2					
	Refer to item 1d, page 62 Are there 3 or more mortgages or loans on this home?	2. 8594 1					
11	How much principal is currently owed on all the remaining mortgages or loans not reported previously?	8596 \$. 00 x1 □ DK x2 □ Ref. 8597 1 □ Office Use Only					
2.	(Including rental properties attached to or located on 's own residence), what is the current value of this property; that is, how much do you think it would sell for on today's market if it were for sale?	\$ \$ \$. 00 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$					
	Refer to cc item 15. Tenure of mobile home.	1 Owned or being bought 2 Rented for cash – SKIP to 5 3 Occupied without cash rent – SKIP to 6					
3a	Is there a mortgage, installment loan, contract to purchase, or other debt on this mobile home or SITE?	1 Yes 2 No x1 DK x2 Ref. SKIP to 4					
b	Is this a mortgage, contract, or other debt for just the SITE, or does it also apply to this mobile home?	1 ☐ Mobile home only 2 ☐ Site only 3 ☐ Site and home					
C	How much principal is currently owed on this (these) mortgage(s)?	\$. 00 x1 DK - Probe x2 Ref.					
4.	How much do you think this mobile home (and SITE) would sell for today if it were for sale?	8630					
5.	How much was this household's (rent/mortgage payment) last month? (Include any condominium or association fees.)	8638 \$. 00 . x3 \(\text{None} \) None \(\text{x1} \) DK \(\text{Chapt them T46 and 64} \)					
6.	How much did this household pay for electricity, gas, basic telephone service, and other utilities last month?	x2 Ref. SAIF to Check item 110, page 64					
	(Other utilities include other fuels and water. Include only payments made in addition to those reported in item 5.)	x₃ ☐ Nothing or included in rent x₁ ☐ DK x₂ ☐ Ref. SKIP to Check Item T16, page 64					

Section 4 - TOPICAL MODULES (Continued)									
	-8	REAL ESTATE, SH	ELTER	COSTS, DE	PEND	ENT CARE, AN	ID VEHICL	ES (Contin	ued)
CHEC	T15 23, a	osition of no other person 18 or older > SKIP to Check Item T16							
			1	₄ ☐ Other co	omposi	tion			
	persons livi	nan one of the ing here pay for ortgage payment) is last month?	8644	1 □ Yes - Si 2 □ No	KIP to 9				
8. 1	Which perso	on paid?	8646	Person No.			Na	ime	SKIP to Check Item T16
9. 1	Which perso	ons paid and how ach pay?	l I	Person 1		Persor	1 2	Pe	rson 3
	much did e	ach pay?	Perso	on No.		Person No.		Person N	0.
			8647			8648		8649	
			Nam	e		Name		Name	
			8650	\$. 00	8651 \$. 00	8652 \$. 00
		7		x1 □ DK x2 □ Ref.		x1 □ DK x2 □ Ref		X1 ☐ X2 ☐	DK Ref.
CHEC	T16 and 2	r to cc items 18, 23. ber of persons in ehold	8654	1 ☐ One – S 2 ☐ Two or		Check Item T17			
NOTE	S								

Section 4 - TOPICAL MODULES (Continued)							
Part C - REAL ESTATE, SHELTER COSTS, DEPENDENT CARE, AND VEHICLES (Continued)							
10a.	Last month, did anyone a child or a disabled pe member could work, at for a job?	here pay for the care of rson so that a household ttend training, or look	1 Yes 2 No - SKIP to Check Item T17				
b.	What was the total cos arrangements for the m	t of these care nonth of (Read last month)?	x1 □ DK				
			x₂ ☐ Ref.				
CHE	IT17 Is this residence in	16a and 16b. n a public housing project, is it neither public nor	8658 1 ☐ In a public housing project 2 ☐ Subsidized 3 ☐ Neither public nor subsidized				
11a.	or undeveloped lot? Ex	such as a vacation home clude rental property rental property attached	8660 1 Yes 2 No x1 DK SKIP to 12a				
b.	Which persons in this h of this (these) property	ousehold are the owners (ies)?	Person No. Name				
	2		8664				
c.	What is the total value equity in this (these) pr we mean the amount the selling the property and Count only share owned it	operty(ies)? (By equity, nat could be obtained by d paying off any debts.)					
	Count only share owned t	by nousehold members.	8667 1 Office Use Only				
12a.	Does anyone in this hos or truck, excluding reci and motorcycles?	usehold own a car, van, reational vehicles (RV's)	1 ☐ Yes 2 ☐ No – <i>SKIP to 13a</i>				
b.	How many cars, trucks, owned by members of	, or vans are this household?	8716 Number of	motor vehicles			
	(Ask items 12c-12g for	Vehicle 1	Vehicle 2 Vehicle 3				
	to 12c for additional						
c.	vehicles.) Who is (are) the owner(s) of the (newest, next newest) motor vehicle?	Person No.	Person No. 8720 Name	Person No. 8722 Name			
	motor venicle?						
		Person No.	Person No. 8726 Name	Person No. 8728 Name			
d.	What is the year, make, and model of this vehicle?	8730 1 9 X1 DK	8732 1 9 X1 DK	8734 1 9 X1 DK			
		PGM 8 Make	PGM 8 Make	PGM 8 Make			
		8736 X1 DK	8737 X1 DK	8739 X1 DK			
		Model	Model	Model			
		8741	8743	8745			
	8741 8742 ×1 □ DK		8744 X1 DK	8746 X1 DK			
		(0.050)	695525	(3)(6)(0)			
		PGM 7	OFFICE USE ONLY	OFFICE USE ONLY			
	***************************************	8748	8750	8752			

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